



Tax Academy Curriculum

2026 Beginner & Advanced Programs

Build practical tax preparation skills. Learn professional workflows. Prepare to serve real clients with confidence.

6 Weeks	Hands-On Practice	Career-Focused
Live, structured instruction	Guided mock return assignments	Business-building and client readiness

Program Overview

The CPAngel Tax Academy is designed for aspiring and developing tax professionals who want practical training beyond theory.

Students learn core federal tax concepts, complete guided practice assignments, become familiar with professional tax software, and develop the business skills needed to attract and serve clients.

The Beginner Program focuses on individual income tax preparation. The Advanced Program expands into business returns, multi-state issues, tax planning, IRS correspondence, and practice growth.

Beginner Program	Mondays, September 14 - October 19, 2026
Advanced Program	Wednesdays, September 16 - October 21, 2026

Virtual graduation: Friday, October 23, 2026

Beginner Tax Preparation Program

A six-week foundation for students preparing to enter the tax industry or strengthen their individual tax return preparation skills.

Week	Module	Topics & Application
1	Entering the Tax Industry	• The tax professional's role and responsibilities • Preparer Tax Identification Number (PTIN) requirements • Professional ethics, due diligence, and compliance standards Applied assignment: Complete IRS due diligence training and obtain a PTIN.
2	Filing Status, Dependents & Income Reporting	• Choosing the correct filing status • Dependency rules and qualifying person tests • Reporting wages and common information returns, including Forms W-2, 1099-K, 1099-NEC, and 1099-MISC Applied assignment: Complete Mock Return Parts 1 and 2: filing status, dependents, and income reporting.
3	Deductions, Adjustments & Tax Credits	• Standard deduction versus itemized deductions • Common adjustments to income • Applying individual tax credits accurately Applied assignment: Complete Mock Return Part 3: Schedule A and tax credit applications.
4	Self-Employment & Schedule C	• Reporting sole proprietor and independent contractor income • Identifying ordinary and necessary business expenses • Preparing Schedule C and calculating net business income Applied assignment: Complete Mock Return Part 4: Schedule C.
5	State, Amended & Specialized Returns	• Preparing state income tax returns • Correcting previously filed returns using Form 1040-X • Introduction to Form W-7 and ITIN application procedures Applied assignment: Complete mock amended return scenarios.
6	Software, Client Readiness & Business Development	• Professional tax software orientation and workflow • Brand positioning, marketing, and business consulting • Comprehensive review and completion of the mock return Applied assignment: Create a prospective client list of at least 10 people by Wednesday, October 21 to participate in graduation.

Advanced Business Tax Program

A six-week program for tax professionals ready to expand into business returns, tax planning, IRS resolution, and profitable practice management.

Week 1	Business Tax Fundamentals • Business entity overview and tax classification • How business returns connect to the individual taxpayer • Core business tax documents and professional workflow
Week 2	S Corporations - Form 1120-S • S corporation return structure • Shareholder basis, distributions, and pass-through reporting • Schedule K-1 reporting considerations
Week 3	Partnerships - Form 1065 & Schedule E • Partnership return fundamentals • Partner allocations and Schedule K-1 • Reporting pass-through activity on Schedule E
Week 4	Multi-State & Business State Taxes • State filing obligations for businesses • Nexus and multi-state considerations • Common business state tax requirements
Week 5	Tax Planning & IRS Notices • Proactive planning strategies for business clients • Reading and responding to IRS correspondence • Managing client documentation and resolution workflows
Week 6	Building a Profitable Tax Business • Practice management and internal workflows • Strategic pricing and service packaging • Client retention and long-term relationship management • Comprehensive program review